



211 S. Columbus Blvd.
Philadelphia, PA 19106

March 17, 2023

Stock Transfer Instructions – for Endowment and all ISM contributions.

PMA: Caren Shapiro, cshapiro@prudentmanagement.com, 215-994-1062 (direct)
Jonesy Lerch, rlersch@prudentmanagement.com, 215-994-1062

Independence Seaport Museum – PMA #1099

Fidelity Investments

DTC #: 0226

Acct. # 636-008316, Independence Seaport Museum

(Please note the Seaport's name and Fidelity account number must be included on this line in the transfer instructions. Otherwise, the donation will not be credited to Seaport's account.)

To ensure the donations are properly credited to you and the Seaport's account upon receipt, please email or have your financial manager email Caren Shapiro, cshapiro@prudentmanagement.com, at PMA and Meg North, mnorth@phillyseaport.org, at ISM with the following information before the donation is made:

- Name and symbol of the stock being donated
- Amount of shares
- Name of firm shares are transferring from i.e. Fidelity, Schwab, etc.
- Approximate date of transfer

Wire Instructions – Cash contributions

WSFS Bank

Contact Meg North, Director of Development at mnorth@phillyseaport.org for ISM bank account information.

Discovering Philadelphia's river of history and world of connections

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